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Public Service Commission of Wisconsin
RECEIVED: 03/31/2021 10:40:13 AM

March 31, 2021

Mr. Mitch Horrie
Public Service Commission of Wisconsin
Hill Farms State Office Building, 6th floor
4822 Madison Yards Way
P.O. Box 7854
Madison, WI 53707-7854

**Re: We Energies Conservation Activities and Voluntary Utility Programs for 2020.
Docket No. 5-EE-2020**

Dear Mr. Horrie:

Enclosed is the We Energies 2020 Wisconsin Utility Energy Efficiency, Customer Service Conservation Report for January 1 – December 31, 2020.

If you have any questions concerning this report, please contact Missie Muth at 414-221-2380 or missie.muth@wecenergygroup.com.

Sincerely,

A handwritten signature in blue ink, appearing to read "Rich F. Stasik".

Richard F. Stasik
Director - State Regulatory Affairs

Enclosure

Wisconsin Utility Energy Efficiency, Customer Service Conservation Report



2020 Annual Report (January-December)

Submitted: 5-EE-2020

We Energies serves as a trusted energy advisor to each of our customers. We Energies' customer service conservation portfolio educates and improves customers' awareness of their energy usage and how their actions can control their energy use and costs. The portfolio is designed to meet Commission energy efficiency policy objectives and planning guidelines while achieving Company objectives tied to strengthening customer participation in the Focus on Energy program, maintaining high levels of customer satisfaction, and holding down program costs. We Energies' portfolio offers residential, agriculture, and commercial / industrial customers a range of energy-saving tools, information, and assistance. This document reports the achievements of We Energies' customer service conservation portfolio including customer service conservation activities and voluntary efficiency programs from January 1, 2020 through December 31, 2020.

Budget

Category	(2020) Spending	(2020) Budget
Residential	\$1,917,845	\$3,116,020
Commercial & Industrial	\$3,039,704	\$4,411,401
General Conservation	\$783,042	\$1,170,200

Note: The Customer Service Conservation funds are part of an escrow account, only spent dollars are recovered. Various category budgets are in line with where we would like to spend in each area. Additional activities in the next few years will more closely align spending with budgets.

Residential

Project Name: Energy Efficiency Education

Project Description/Objective:

The primary objectives of customer outreach and education is to educate customers on energy conservation through community outreach, increase customer awareness of energy conservation, and promote Focus on Energy programs. We Energies acts as a trusted energy advisor to our customers in assisting them in using energy while collaborating with Focus on Energy to avoid duplication of efforts.

Project Summary (Update of Activities):

The following is a breakdown of 2020 initiatives:

- Money Saving Materials/Kits – In the spring and fall of 2020, kits were distributed to 11,406 We Energies customers who called about a high bill and to customers through low income organizations. The kits included practical and simple to use measures including window insulation, a "Money Saving Fact Sheet", one LED light bulb, and one LED night light and a switch to help eliminate standby power loss.
- Energy Grams (E Grams) – E grams are emailed to approximately 600,000 residential customers per quarter and include videos, infographics and articles with simple energy efficiency tips as well as links to more detailed information and to Focus on Energy.
- QR Management - In 2020, We Energies continued to dynamically assign QR codes to promote energy conservation. QR codes were placed on money saving kits and provided the ability to quickly direct customers to information and web sites related to energy conservation. This included referring customers to energy saving tips, energy conservation information, and Focus on Energy programs. In 2020, We Energies Money Saving Kits reached over 11,000 customers. Since utilizing QR codes for energy efficiency, 4,800 scans have directed customers to energy efficiency tips.
- Advertising - We Energies enhanced its mass media campaign in 2020 by delivering targeted energy efficiency messaging, to specific customer segments through a variety of communication channels. Our four segments and messaging strategies included:

Segment	Message
Convenience Seeking Customers	Tech Savvy / EE Products
Comfort Seeking Customers	Whole Home Improvements
Information & Control Seeking Customers	DIY / Low-Cost or No-Cost Improvements
Cost Savings Seeking	Energy Efficiency Tips/Programs General

Unique campaigns were established for each segment to increase awareness of Focus on Energy programs and ways to manage energy use and costs. Our advertising channels included a combination of digital, radio, billboard and print ads. Spanish language versions were released through billboard, print and radio channels. Website content was also enhanced to provide a better customer experience and handoff to Focus on Energy.

We Energies saw a 60% increase in residential participation for the programs included in the mass media campaigns.

- Social Media (Facebook / Twitter posts) In 2020, We Energies included energy efficiency related GIFs on social media in the regular content rotation. Topics included low cost, low effort energy

efficiency tips. Text accompanying the GIFs directed the audience back to the We Energies Money Saving Tips webpage.

- Claritas PRIZM Codes - PRIZM codes assist We Energies in providing targeted outreach for energy efficiency efforts. In 2020, we continued to utilize PRIZM code data to select groups of customers for targeted energy efficiency messaging. Based on customer themes, we selected specific media channels to use in our Residential Energy Efficiency Advertising Campaign as noted above.
- Explainer videos – In 2020, We Energies developed three short (1-2 minute long) videos to help our customers understand energy terms, concepts, and applications; and then take action to save. Content development continued through 2020, with more videos becoming available in 2021. Initial video topics are an overview of basic electric and natural gas terms, examples of what influences a customer's energy bill to be larger than expected and tips for easy things customers can do to save. Additional videos and topics under consideration for 2021 include energy assessments, both in-person and on-line; smart houses; steps to conserve energy if you are renting your home or apartment; and what Focus on Energy can do for you.

Costs:

Project	Planned	Actuals
Energy Efficiency Education	\$886,300	\$546,720

The following is a breakdown of significant project costs:

Money Savings Materials / Kits	\$272,521
QR Management	\$114,879
Advertising ¹	\$67,149
PRIZM codes	\$44,210
Energy Grams	\$43,408

Note: New activities and the expansion of existing activities in the next few years may increase spending to more closely align with the budget.

Project Name: Software Tools

Project Description/Objective: Software tools help customers improve their understanding of and managing their energy usage. Using such tools allows customers to make informed decisions about their usage and puts them in a good position to use Focus on Energy programs.

Project Summary (Update of Activities):

The following is a breakdown of 2020 initiatives:

- Aclara Home Energy Center – We Energies offered Aclara Home Energy Center as an online tool to help customers improve their understanding of their energy usage. This tool also suggests specific energy efficiency opportunities for customers based upon their actual usage. In 2020, an average of 45,314 unique users visited the Aclara Home Energy Center per quarter, resulting in an average of 293,251 total page views each quarter.
- MyHeat – In 2020, We Energies continued its multi-year contract with MyHeat to provide infrared heat mapping of residential properties in pilot areas of our service territory. The raw thermal data is processed with algorithms to reveal individual building's heat loss details. In 2020, We Energies used results of the MyHeat mapping to help select participants for the Residential Assistance Program.

Our Corporate Communications team finalized the appropriate content with local imagery to provide the best customer engagement and outreach in 2020, however due to COVID 19 our customer outreach plans that had direct customer contact had to be cancelled. Plans are progressing, for 2021 to incorporate the MyHeat thermal images into residential customer outreach within our territory in various ways and gather data on how this level of information drives engagement.

- **New online tools** – New online tools – Continued research into online tool options for residential customers occurred in 2020. Online tools help put customers in the best position to be aware of their usage, know the impacts of their actions on usage, and highlight available resources and programs available to them. We Energies strives to provide its customers with a consolidated, efficient option. A new online tool pilot (mentioned later in the C&I section) was launched in 2020, and continues into 2021, and will additionally include investigations into technical requirements for a full roll-out for customers in 2021 or 2022.

Costs:

Project	Planned	Actuals
Software Tools	\$1,124,720	\$333,376

The following is a breakdown of significant project costs:

Aclara Home Energy Center	\$193,126
My Heat	\$140,250

Note: New activities and the expansion of existing activities in the next few years may increase spending to more closely align with the budget.

Project Name: Customer Education K-12

Project Description/Objective: The Wisconsin K-12 Energy Education Program (KEEP) aims to leverage teacher education to improve and increase energy literacy in Wisconsin PK-12 schools as a means of contributing to statewide energy savings.

Project Summary (Update of Activities):

Wisconsin K-12 Energy Education Program (KEEP) – In 2020, The Wisconsin K-12 Energy Education Program (KEEP) continued to increase energy literacy through both formal and non-formal educators and their students. Although activities were impacted by COVID-19 after March 14, KEEP provided professional development and training to teachers and some direct services for student-focused events. KEEP targeted schools, teachers, and students in a variety of events in the We Energies territory in 2020:

Annual Impact

179 educators and 6 students were directly supported by KEEP outreach and programs potentially impacting an additional 9,867 students indirectly.

COVID-19 impact: KEEP was unable to determine utility service territory for 56% of teachers who participated in 2020, due to the shift to virtual, and often asynchronous, engagement during the on-going COVID-19.

Professional Development & Training

98 educators participated in 7 professional development workshops made possible by KEEP potentially impacting 5,880 students. Including:

- Technology and engineering teacher leader Matt Lonergan (Oak Creek High School) attended Better Buildings: Better Business supported by a Slipstream registration scholarship.
- West Bend School District Outdoor Classroom hosted new KEEP workshop *Forest Health and the Energy Connection* for 11 educators.
- 85 pre-service teachers from Carroll University (Waukesha) and Fox Valley Technical College (Appleton) participated in KEEP energy education trainings.
- 1 educator completed KEEP's "Energy Education: Concepts & Practices" online asynchronous module.

Conferences & Events

4 educators attended 2 sessions presented by KEEP staff at conferences, events or other trainings potentially impacting 240 students. Including:

- KEEP interacted with 4 We Energies educators during 2 conferences/events: School Leaders Advancing Technology in Education (SLATE) and Wisconsin Technical Education Association (WTEA) annual conferences.

Youth & Community Engagement

6 students and 3 teachers participated in direct student engagement sessions offered by KEEP at 1 school or community events reaching families from 3 communities. Including:

- KEEP provided activities for 6 FFA high school students during a UW-Stevens Point College of Natural Resources recruitment event. Schools included: Burlington High School, Fennimore High School, and Shullsburg High School

Curriculum & Resources

74 teachers accessed hands-on or digital curriculum and resources from KEEP potentially impacting 3,747 students. Including:

- 7 teachers utilized hands-on energy education resources through the WCEE Trunks & Kits lending program, including Fox Valley Technical College natural resources program.
- 46 teachers registered for 6 energy-themed videos facilitated by sustainability experts throughout Wisconsin as part of the Green & Healthy Schools Wisconsin Classroom Learning Series.
- 14 teachers registered for KEEP's four-part Exploring Energy Outdoors video and activity series.
- Teacher Seth Zoellner's science students at Trinity Lutheran School (Waukesha) utilized KEEP's online energy scavenger hunt during October Energy Action Month.
- Due to COVID-19, the Milwaukee-based We Energies Energy Audit Kit was not utilized in 2020.

Communications

10 stories/shares featured We Energies schools/communities and/or company resources as part of KEEP communication efforts. Highlights include:

KEEP monthly newsletter, approximately 10,000 subscribers.

- April: We Energies Peregrine Falcons

KEEP's Facebook page, approximately 570 followers.

- July 15: We Energies Energy for Tomorrow Energy quiz
- July 20: We Energies Energy for Tomorrow Heating & Cooling costs
- September 7: We Energies WisBusiness Back to School energy efficiency
- October 20: We Energies Youth Apprenticeships

Green & Healthy Schools Wisconsin – Provider

- KEEP supported the inclusion of K-12 schools as part of RENEW Wisconsin's [new map of commercial renewable energy installations](#), including many We Energies schools.

- Lincoln Avenue Elementary School (Milwaukee) and Indian Community School (Franklin) were honored with 2020 U.S. Department of Education Green Ribbon School Award.
- 340 participating schools and districts; Green & Healthy Schools Wisconsin launches [new effort to recognize every school](#) in the State.

Project	Planned	Actuals
KEEP	\$180,000	\$182,714

Note: An increased contribution request resulted in spend over budget.

Project Name: Voluntary Program – Residential Natural Gas Assistance Program

Project Description/Objective:

We Energies developed the Residential Natural Gas Assistance Program (RAP) to effectively serve a segment of customers who were not taking advantage of Focus on Energy. RAP provides home weatherization assistance to selected eligible customers to help reduce energy costs through weatherization services. RAP provides otherwise unable customers the ability to update aspects of their home to improve their quality of life and reduce their energy usage. RAP closely coordinates with Focus on Energy and leverages Focus on Energy resources and incentives to ensure maximum benefit to customers. RAP is not a new program, yet we continue to enhance and improve the process and benefits.

While we were able to meet program goals in 2020, the RAP program was impacted by COVID-19 Stay at Home orders. The program did not complete any projects between May and mid-July.

Note: The energy savings resulting from this program were credited to Focus on Energy. We Energies did not estimate or claim savings for the non-Focus on Energy measures installed through RAP.

Project Summary (Update of Activities):

The following is a breakdown of 2020 initiatives:

Unit Goal	Savings Target	Units completed	Savings Achieved (Annual)	Savings Achieved (Life Cycle)
150 units per year	60,000 therms	162	37,184 therms	743,662therms

**Note – As of 3/4/2021, savings have not been reported for approximately 7 units completed by RAP in 2020.*

While not a goal of the program, RAP assisted in repairing 8 gas leaks at customer properties. Gas leaks were present and repaired in 5% of RAP homes.

Our Trade Allies installed 2,249 LED lightbulbs in 131 units, an average of 17 lightbulbs per unit, with an estimated annual savings of 100,051kWh or lifecycle savings of 1,986,790kWh. (Savings based on Focus on Energy 2018 & 2019 Technical Reference Manual for residential LED lighting.)

Customer Testimonial:

The following is feedback from a customer regarding her experience in the RAP program: The customer stated the contractor did an amazing job at her home. She felt the staff was so friendly and helped her get qualified through We Energies. They provided excellent work with great attitudes and walked her through the entire work order. She couldn't be happier with how her house turned out.

Costs:

Project	Planned	Actuals
Residential Assistance	\$850,000	\$799,641
Residential Assistance Administration	\$75,000	\$55,394
Total	\$925,000	\$855,035

Commercial & Industrial

Project Name: E Source

Project Description/Objective: E Source membership dues. E Source is a great source to acquire feedback/research on problems involving energy efficiency, utility customer satisfaction, marketing, customer management, and sustainability.

The following is a breakdown of 2020 initiatives:

We Energies participates in multiple E Source programs including:

- Business Energy Advisor (BEA) - BEA is an online library for small/medium business use. The library provides average usage information and energy savings ideas by business type or technology type. In addition, there are articles and tips on ways for customers to manage their energy costs. Business customers gain a broader knowledge of energy efficiency measures via this tailored library. The 2020 traffic data for the We Energies web site was ~405 visits with ~910page views. The top 5 most-visited We Energies BEA pages in 2020 were:
 1. Congregational buildings
 2. Small and midsize offices
 3. Manufacturing facilities
 4. Restaurants
 5. K-12 schools
- DSM Insights / DSMdat – As we continue to look to improve current or add new energy efficiency offerings for our customers, DSM Insights serves as a valuable tool to research current utility offerings. Research from this tool will be used in our conservation escrow planning for utility pilots and programs. This searchable database includes access to data on DSM budgets and impacts, thereby enabling We Energies to benchmark our programs against programs offered by other utilities in the US and Canada. DSMdat is an additional database component that offers detailed program information such as the measures, incentives, and segments targeted by utilities and others in the US and Canada.
- Account Managed Services – Account Management Services includes access to various resources for Account Managers, including multiple libraries, overviews of energy technologies and energy-efficiency strategies, industry-specific market intelligence, benchmarking tools, and other resources that will assist in strengthening business customer relationships
- Distributed Energy Resources (DER) – Distributed Energy Resources includes access to various DER Strategy publications, market research, and deliverables from existing working groups. This resource serves as a channel to understand the voice of customer in implementing an EV pilot and preparing for growth in Solar installations.

Costs:

Project	Planned	Actuals
E Source	\$122,701	\$147,457

**Note – E Source spend is above budgeted amount due to DER program addition in 2020.*

The following is a breakdown of significant project costs:

BEA	\$48,985
DSM Insights/DSMdat	\$21,140
Account Managed Service	\$28,936
DER	\$48,396

Project Name: C&I Customer Outreach

Project Description/Objective:

Marketing and Outreach communications to business customers intends to inform business customers of the various energy-efficiency programs, services and equipment available to help them reduce energy use and costs. It also updates customers on We Energies and Focus on Energy programs.

Project Summary (Update of Activities):

- *Energy Insights Newsletter* - The *Energy Insights* monthly e-newsletter promotes energy efficiency programs, services, and equipment. In 2020, *Energy Insights* included videos, infographics and links to additional articles and information. Two versions were sent each month: one for account managed customers, and one for all other business customers. Based on e-newsletter metrics, articles were tailored to customer preference and engagement.

- *Energy Insights* account managed version was sent to approximately 715 large business customers.

2020 cumulative effectiveness:

- 27.89% open rate
- 35.72% Click-to-open Rate

2019 cumulative effectiveness:

- 23.50% *Open rate*
- 33.76% *Click-to-open Rate*

- *Energy Insights* business version was sent to approximately 2,275 business customers.

2020 cumulative effectiveness:

- 20.37% open rate
- 25.57% Click-to-open Rate

2019 cumulative effectiveness:

- 20.45% *Open reach*
- 4.81% *Click-thru reach*
- 23.50% *CTOR (Click-to-open Rate)*
- .11% *Opt-out rate*

Costs:

Project	Planned	Actuals
C&I Customer Outreach	\$333,000	\$41,400

Note: New activities and the expansion of existing activities in the next few years may increase spending to more closely align with the budget.

Project Name: C&I Software Tools

Project Description/Objective:

Software tools for business customers complement our EES program in helping customers improve their understanding of and managing their energy usage. Customers are provided with ways to reduce their energy consumption as well as avenues to review their usage. Using these tools allows customers to make informed decisions about their usage and puts them in a good position to use EES and Focus on Energy programs. We continue to identify the best possible ways to provide such information to our customers through a multi-year effort.

Project Summary (Update of Activities):

- Agentis Account Monitor - We Energies, with Agentis, offers our customers a We Energies branded platform, Agentis Account Monitor, an online tool to help medium business customers improve their understanding of their energy usage. This tool also suggests specific energy efficiency opportunities for customers based upon their actual usage. Account Monitor includes charges for upgrade to allow customers to download energy use data in both the Green Button format and as a spreadsheet that is compatible with the Energy Star Portfolio Manager tool. In the first quarter of 2021 we are expanding access to include small electric customers and all natural gas customers. There are a total of 1,095 registered users of the Account Monitor Tool, including 93 new users added in 2020. In 2020, those users engaged in 3,024 sessions and 13,552 page views.
- One-2-Five® Benchmarking - One-2-Five® Energy is benchmarking software providing a systematic, continuous improvement approach to managing energy. One-2-Five® Energy reports generated show an organization's level of development and identify specific areas for improvement. Two One-2-Five® sessions were explored by We Energies customers in 20120. In both cases customers decided not to move any further with this service due to the difficulties created by the COVID-19 health pandemic. We Energies continues to examine the usefulness of this tool for our customers.
- Business Phone Assessment – We Energies identified a gap in small business access to easy energy efficiency opportunities due to the workload level associated with owning a small business. The business phone assessment tool allows an Energy Advisor to walk through a short series of questions with the customer and provides the customer with a list of energy efficiency opportunities. The phone Assessment was completed by approximately 195 customers in 2020. Outreach efforts after the beginning of the COVID-19 health pandemic and during Wisconsin's Safer At Home order focused on how these events were affecting customer energy usage and educating customers on what they could do to change that. Because of this we saw a reduction in the traditional "opportunity identification" type of service like the phone assessment tool. These services picked up as the initial impacts lessened at the end of 2020. In addition, WPS and We Energies collaboratively worked with Focus on Energy to incorporate the Small Business Energy Savings Pack offering into the customer outreach email after a completed phone assessment. Once a customer completed the phone assessment with an EES Advisor, they were sent a follow-up email that covered what they discussed along with a link to the free Energy Savings kit options offered by Focus on Energy. This offering was available until discontinuation of the Focus on Energy Small Business kit
- iAvenue improvements – In 2020, We Energies continued implementing upgrades to our iAvenue system relating to our EES Services, customer outreach enhancements, NAICS validation, and SPECTRUM data integrations.
- New Online Tools - Online tools help put customers in the best position to be aware of their usage, understand the energy impacts of their actions, and find available resources and programs. We Energies currently provides multiple tools for customer information presentment. In 2020, we launched a customer data presentment pilot in an effort to move to consolidate our customer tools and expand the information available to our customers to help them understand

their energy use. This pilot launched in Q3 2020, and continues into 2021 with additional data points (e.g., renewable energy customers, rate comparison evaluations). In 2021, we will also conduct investigations of the technical requirements for incorporating a chosen solution into our existing customer self-service platforms, potentially in 2021 or 2022. Rate Comparison Tool - In 2020, WEC developed an Energy Management / Efficiency analysis tool for C&I customers based off of existing rate comparison functionality. This was developed in response to customer requests for information relating to rates and how their choices impact their energy usage and bills. This tool allows for utility personnel to help customers better understand and control their energy usage by allowing modeling for bill periods based on interval data. This tool also assists with annual rate comparisons for C&I customers.

Costs:

Project	Planned	Actuals
C&I Software Tools	\$845,700	\$452,411

The following is a breakdown of significant project costs:

Agentis Account Monitor	\$315,165
Envinta One2Five Licenses	\$10,500
Rate Comparison Tool	\$15,723
iAvenue improvements	\$105,639

Project Name: Energy Efficiency Services Program

Project Description/Objective:

In 2014, following an RFP process, We Energies contracted with Franklin Energy Services to provide the Energy Efficiency Services program.

The Energy Efficiency Services (EES) program was designed by We Energies to help our customers take full advantage of Focus on Energy programs and incentives. It is designed to raise business customers' awareness of energy efficiency and its value. Our EES program provides a consistent, available resource for business customers, supports the customer from initial interest or education about their energy use and options, through project completion (if desired), for projects of all sizes.

The EES program complements the efforts of Focus on Energy by offering services designed to encourage broader participation across all of Focus on Energy's energy efficiency programs, it turns concepts into actionable items.

While savings in this program are claimed by Focus on Energy, EES focuses on encouraging energy efficiency behaviors in our customers. We Energies Account Managers, who serve large energy customers, play a significant role in the program through energy planning and efficiency opportunity identification. EES team members collaborate and work with Focus on Energy staff to provide customers with incentives and technical assistance. EES team members assist small and medium size businesses in navigating the Focus on Energy process and seeing projects through to completion.

Project Summary (Update of Activities):

The following is a breakdown of the services that are provided through the EES program at We Energies. Service descriptions remain the same from 2019 to 2020. Because of the landscape changes caused by the COVID-19 health pandemic and the Safer At Home order in Wisconsin, the program adopted an approach of emphasizing virtual offerings to meet customer needs whenever possible.

- **Energy Efficiency Consultations** – Customers of all sizes have complex questions related to energy efficiency technology and their specific usage. Consultations with Energy Advisors are used to increase customer understanding and may lead to customer action including behavior changes and Focus on Energy projects. These consultations are performed over the phone, via email and occasionally in person but do not include an Energy Assessment.
- **Energy Assessments** – Energy Assessments can be conducted for all customer types. Energy Assessments include recommendation reports and customer follow-up. An energy use index report helps the customer evaluate future performance. Customers are prescreened prior to being offered this service to ensure that only those customers who are likely to participate in a project are provided this offering. Customers are also assessed a co-pay, which is waived if at least one recommendation is acted upon.
- **Technical Services** – Additional technical assistance in the form of temporary data logging, permanent sub-metering, or technical audits is available for customers needing this advanced service. Customers must be willing to pay for a portion of the sub-metering and are responsible for a portion of the energy assessment if they do not follow through with an energy efficiency related project.
- **Benchmarking** – Benchmarking helps customers to easily monitor and measure their energy efficiency progress. Our customers can choose from two kinds of benchmarking tools. One-2-Five® Energy and Energy Star Portfolio Manager. One-2-Five® shows an organization's level of development and identifies specific areas for improvement. The Energy Star Portfolio Management tool uses historical energy usage data and enables customers to measure and track their company's energy and water consumption, including greenhouse gas emissions. The Energy Star Portfolio Management tool incorporates the industry's leading performance ratings and compares them against the company's results.
- **Energy Teams** – Energy Teams provide a forum for companies to discuss energy efficiency options together with our industry experts, and are intended to elevate energy management to a commensurate level of importance with the other strategic and financial issues addressed by an organizations' executive management. Energy Team meetings are used to educate the participants on strategic energy management and the financial impact of energy usage. Energy Teams also provide a platform to cross-market additional programs and services. Energy teams for large business accounts have regular meetings over a period of time. The goal of the program is to drive the teams to a state of self-sufficiency where the energy engineer is not a regular participant. To better serve medium-sized customers, the program is offering an energy advisor to work with the customer to establish an Energy Team. The advisor then remains available for consultation and checks in with the team at regular intervals to assess progress and recommend the appropriate Focus on Energy offerings.

In addition to services; in 2020, EES conducted customer outreach efforts.

Energy Efficiency Services Outreach - Outreach efforts target Small & Medium sized commercial & industrial customers. In 2020, approximately 11,914 customer accounts were contacted through this outreach.

- **Pandemic Email Outreach** – We Energies sent an email to specific industrial and managed accounts that were identified as reducing operations. The email included recommendations for systems that should be reviewed or considered for shutdown when attempting to reduce energy.
- **Outbound Call Campaign** - We Energies engaged in six targeted outbound call campaigns in 2020. The program began with sectors that were identified in the past as low participators with Focus on Energy, but began prioritizing sectors that we anticipated would be most affected by the impacts of COVID-19. The six target groups were:
 - Religious Organizations: 2,244 Customers called, 481 customers served (21.4%)
 - Restaurants: 779 Customers called, 139 customers served (17.8%)
 - Schools: 1,296 Customers called, 200 customers served (15.4%)
 - Small Healthcare: 650 Customers called, 220 customers served (33.8%)

- Vehicle Services: 632 Customers called, 273 customers served (43.2%)
- Small Manufacturing: 1,352 Customers called, 103 customers served (7.6%)
- New Service Campaign – An outbound calling campaign for “New Service” business customers continued in 2020. Through this outreach, customers receive a phone call within 90 days of starting utility service in an effort to ensure that they are taking advantage of all options available to them as they are building their business. The goals of this campaign are to promote Focus on Energy, educate customers on Energy Management tools available to We Energies customers, and to make customers aware of the services available through the Energy Efficiency Services Team. Approximately 4,740 customers were contacted through this campaign, which resulted in approximately 1,329 customers receiving a service or information (28%).

In addition to working with customers to leverage the Focus on Energy programs, there are other benefits to customers that come from the expertise of the EES team.

For example: In 2020, the Public Service Commission of Wisconsin offered an Energy Innovation Grant Program that covered a variety of energy related projects. The EES team identified customers that had expressed interest in previously reported opportunities but did not have the resources to implement at the time, and offered to assist in the OEI application development and submission process. Through these efforts, the program was able to identify and assist three WEC customer’s that would not have originally pursued this opportunity. In 2020, and the ongoing Covid-19 pandemic, had many companies wondering what they can do to slow the spread of the virus and improve the safety of their employees. The EES team wrote articles that were published in the Energy Insights Newsletter that are sent to all business accounts with an email on file. For example, one article focused on ultraviolet germicidal irradiation for disinfection, with another focused on HVAC equipment and operational changes to better position systems to help reduce exposure to airborne pathogens, such as SARS-CoV-2.

Customer Satisfaction:

In the national 2020 E Source Large Business Gap and Priority Benchmarks Survey, 78.1% of WEC customers surveyed indicated that they were highly satisfied. Relating to Energy Efficiency specifically, 84% of WPS and 82% of We Energies customers indicated their utility was their “most trusted resource for energy-efficiency advice.” Additionally, 57% of WPS and 62% of We Energies customers had participated in an energy-efficiency program through their utility in the past 12 months with a Net Promotor Score of 77 and 72, respectively. Customer Satisfaction surveys indicate that 83.3% of our small / medium sized business customers have a greater knowledge of energy efficiency opportunities after working with our EES program.

Customer Success Story:

Overview: In early 2020 - prior to Covid-19 restrictions - the EES program conducted a Level 1 assessment with a religious organization that had received program services in the past.

Results: After the Level 1 was completed, the customer received 14 energy saving recommendations to consider with the most cost effective projects involving converting to LED lighting. The program continued to support throughout the state of Wisconsin’s Stay At Home Order which resulted in the customer completing a number of LED lighting projects and receiving over \$38,000 in incentives. The customer is seeing a reduction of several thousand kWh each month and in most months is down about 30 kW. These savings have caused the customer’s electric bill to drop by \$1,000 each month on average.

Overview: In 2019, the EES program coordinated with Focus on Energy and delivered an energy assessment for a large industrial customer which identified 15 energy efficiency projects with a combined utility savings estimated at \$85,000/yr. Most of these opportunities had simple paybacks less than 2 years. As a result of the energy assessment, the customer decided to pursue the potential savings, and We Energies has helped them establish an Energy Team. The Energy Team meets monthly and is responsible for identifying new projects and implementing energy efficiency solutions.

Results: The Energy Team has been meeting monthly since early 2020 with participation from customer staff, EES program staff, and Focus on Energy staff. In 2020, the customer implemented a reverse osmosis water treatment system and steam trap survey/repair project for which they had received \$33,000 in Focus on Energy incentives and are achieving \$30,000/yr in utility savings. The energy savings are estimated to be 60,000 therms/yr and 10,000 kWh/yr. Both of these projects were identified on the 2019 assessment report. The Energy Team is currently pursuing additional projects including oxygen trim controls on their boiler, low speed/high volume destratification fans, compressed air leak repairs, and conversion of compressed air blow-offs to less energy intensive methods.

The following tables reflect the overall services provided by the EES team throughout 2019 and 2020. For a detailed summary of program results by business segment, see Attachment A.

Overall EES Program Summary		
Service Summary by Year	2019³	2020
Energy Efficiency Assistance (Consultations)	4348	3455
Site Assessments (Level 1)	56	18
Site Assessments (Level 2)	0	2
Technical Services ¹	1	30
Benchmarking	3	1
Energy Team	11	11

Focus on Energy Incentives and Savings as a result of EES Services²		
Focus on Energy Statistics per Year	2019	2020
Total Incentives Paid	\$6,915,449	\$4,498,440
kW Savings	14,758	8,591
kWh Savings	109,683,709	73,593,328
Therm Savings	1,968,797	1,739,905

Notes:

1. Technical Services includes benchmarking, sub-metering, and technical audits.
2. Focus on Energy Incentives and Savings results follow services performed by the Energy Efficiency Services program. Incentives and Savings are attributed to EES projects within the previous 3 years.
3. 2019 numbers are from 2018 PSCW Annual Report.

Costs:

Project	Planned	Actuals
Energy Efficiency Services	\$2,400,000	\$2,190,541

Project Name: Voluntary Program - Design Assistance Program

Project Description/Objective:

The We Energies Voluntary Design Assistance Program (VDAP) provides additional opportunities for our customers to participate in the Focus on Energy Design Assistance Program, after the exhaustion of the

Focus on Energy program budget. In 2020, working with Focus on Energy and the PSCW, we extended the program for eligible projects into calendar year 2022, given the long lead times of these new construction projects. We anticipate a similar filing in 2021 for calendar year 2023 customer projects.

Project Summary (Update of Activities):

In 2020, six customer projects in the We Energies service territory were able to take advantage of the Focus on Energy Design Assistance Program, which otherwise would not have the budget to serve these customers. These customer projects included over 650,000 square feet of space in schools, hotels, office buildings, and a fire station. Looking to 2021, eleven such projects are approved for VDAP (the Focus on Energy Design Assistance budget has been exhausted for projects completing in 2021).

Costs:

Project	Planned	Actuals
Voluntary Design Assistance Program	\$650,000	\$198,239

Project Name: Gas Compliance Audits

Project Description/Objective: Per PSC Chapter 136.04, conservation standards are required to be met prior to natural gas service can be rendered for commercial or industrial space heating use in buildings constructed before July 1, 1978.

Project Summary (Update of Activities): We Energies contracts Franklin Energy to conduct gas compliance audits to determine customer compliance with mentioned conservation standards. During these audits, customers are made aware of resources, such as Focus on Energy and We Energies EES, that are available to them should they pursue actions to reduce fuel consumption.

Costs:

Project	Planned	Actuals
Gas Compliance Audits	\$10,000	\$6,656

General Conservation

Project Name: Training and Conferences

Project Description/Objective: Includes training / conference costs and miscellaneous business expenses.

Project Summary (Update of Activities):

Employees attend trainings and conferences to continue education on energy efficiency related topics. This up-to-date knowledge of technologies and programs results in providing a higher level of service to customers.

Employees attended (primarily virtually) training / conferences presented by E Source, , Renew Wisconsin, Midwest Energy Efficiency Alliance, , Midwest Renewable Energy Association,. In 2021, We Energies will continue to explore appropriate training /conferences for staff to attend.

Costs:

Project	Planned	Actuals
Training & Conferences	\$77,200	\$2,917

Note: Covid-19 travel restrictions reduced spend in 2020.

Project Name: CSC – Energy Efficiency Customer Service Administration

Project Description/Objective:

We Energies encourages our customers to reach out to us for answers regarding energy consumption and efficiency. In response, We Energies provides its customers with energy efficiency and conservation information, education, assistance, and connections to other beneficial resources. This project includes internal and external labor as well as miscellaneous office expenses.

Project Summary (Update of Activities):

Although the following list is not all-inclusive for 2020 labor, the key activities and initiatives that are included in the labor cost budget include the following for utility labor billed through the Conservation Escrow:

- **Business** – Employees oversee the EES program that assists customers to better understand the impact of energy usage at their business. This includes the oversight of the Franklin Energy contract and staff, and all aspects of the programs objectives, metrics and expenditures/budget.
- **Focus on Energy coordination** – Employees stay connected with Focus on Energy staff to ensure follow-up on opportunities for efficiency. Oversees administration of the Focus on Energy residential and business programs to We Energies customers to ensure a positive customer experience, which includes issue resolution, program input, and customer relations.
- **Customer Relations** – Employees are responsible for management of all energy efficiency opportunities in all market segments. Employees provide the strategy, planning, and coordination of all CSC related activities. They also develop and manage the CSC budgets, evaluate options,

develop work plans, respond to PSCW data requests regarding CSC activities, and manage overall program portfolio. Ongoing program/project management and oversight related to customer experience, which includes working with Focus on Energy for co-branding opportunities are also the responsibility of employees.

- **Long Term Conservation Escrow Planning** – In 2020, employees continued working with a consulting firm to implement a 3-5 year plan for the We Energies conservation escrow. Through this plan, priorities were developed with a focus on underserved customers and conservation activity expansion.
- **Renewable Energy** – Employees work on improvements in the ability to track and serve customers and installers through the customer owned generation installation process as well as customer support.
- **Systems Support** – Employees provide support of customer information systems ensuring that energy usage and billing information is available and accessible to customers seeking energy efficiency support.

The following is a summary of the total amount of incentives paid and the total number of participants that were served by Focus on Energy within the We Energies service territory in 2020.

Year	Total incentives Paid*	Total # Participants
2020	\$22,142,162	69,383
2019	\$28,404,175	51,928

Note: (Data in above table was extracted from reports supplied by the Focus on Energy Administrator) Total Incentives Paid – includes lighting incentives, although Total # of participants does not include lighting participants.

Costs:

Project	Planned	Actuals
Administration	\$825,000	\$736,442

Project Name: Slipstream

Project Description/Objective: Slipstream designed and delivered technical and business related skills training, conferences, and on-line training, in which was provided in the We Energies service territory. These educational workshops are designed to complement the Focus on Energy programs and activities in an effort to increase customer awareness of energy efficiency opportunities.

Project Summary (Update of Activities):

For 2020, Slipstream delivered One (1) classroom style educational events and thirteen (13) live and recorded webinars with the support of We Energies' sponsorship.

The following is a breakdown of the sponsored events with the overall course grades and number of attendees/views.

Course	Location	Date	Overall grade (highest = 5.00; rr=response rate)	Total # of attendees
Industrial refrigeration systems: strategies to improve energy efficiency	Sun Prairie	Feb 18	4.4(100% rr)	36

Course	Date	Total views as of 12/31/2020
Building products and systems: the good, the bad, the ugly	Mar 10	38
Deep energy retrofit strategies for aging homes	Mar 10	41
Cathedral roof venting deep dive and demo	Mar 11	39
Bath fan installed performance: the pressure is on!	Mar 11	168
How to increase cooling tower efficiency	June 24	86
Part I: Utilize building automation systems to troubleshoot in real-time	June 26	389
Part II: Make better use of trend data	July 21	56
Part III: Cost-benefit analysis: Quantifying energy conservation opportunities	Aug 4	61
2020 Healthcare lighting trends	Sept 16	58
From process to profit: prove the business case for sustainable manufacturing	Oct 28	20
Compete, save energy, succeed. Better Plants® shows you how	Oct 29	47
Compressed air systems: Stop the leaks, or replace with electric tools?	Nov 11	3
How to increase cooling tower efficiency	Dec 2	41 (live views only; on-demand counted above)

Costs:

Project	Planned	Actuals
Slipstream	\$180,000	\$0

Note: In 2020, We Energies used existing carry over funds to reduce costs.

Project Name: Distributed Energy Financial Group

Project Description/Objective: Project includes membership for the Utility Customer Research Consortium (UCRC) Prepay Energy Working Group (PEWG) organization provides resources to We Energies that allow us to be more effective and provide technical resources and expertise as needed. Membership also assists We Energies in staying current on conservation and other energy technologies, learn and share best practices, and research customer issue / questions. Memberships enable We Energies to be more knowledgeable when advising customers about conservation and energy efficiency measures and practices.

Project Summary (Update of Activities):

- Prepay Energy Working Group - With both brands being represented through WEC Energy Group, WPS accumulated data on what is happening across the country in this market space. Prepay pilots / programs have been formally considered and approved in many states and/or are pending approval. Our involvement is to further research the potential for consumers to change behavior and drop energy consumption.

Costs:

Project	Planned	Actuals
Distributed Energy Financial Group	\$23,000	\$10,000

Project Name: EE Associations & Memberships

Project Description/Objective: We Energies researches emerging technologies and trends in the energy efficiency field. This research and the memberships below help ensure that staff is current on conservation topics and that our offerings are meeting the needs of the customers while meeting the energy efficiency requirements for effectiveness.

Project Summary (Update of Activities):

Organization memberships included:

- WI Green Building Alliance - To better integrate energy efficiency and renewable energy with both new construction and remodeling projects, We Energies has joined the U.S. Green Building Council. We are represented on the Market Leadership Advisory Board for the Wisconsin USGBC Community, which allows us to work collaboratively with trade allies and educators.

- Association of Energy Services Professionals – Employees attend Brown Bag meetings that provide Energy Efficiency information ranging from new technologies to business best practices.
- Wisconsin Association of Energy Engineers (WAE) – Employees can attend monthly meetings where EE professionals are able to learn about and witness first hand energy efficiency projects, many at our customers' sites. Knowledge gained at such meetings is shareable with other customers.
- Subscriptions & Miscellaneous – This provides the opportunity for our teams to subscribe to Energy Efficiency related publications.

Costs:

Project	Planned	Actuals
Associations & Memberships	\$40,000	\$27,013

Project Name: Hosting & Sponsoring Events

Project Description/Objective: Promotional materials, advertising, and sponsorship fees for Customer Service Conservation related events.

Project Summary (Update of Activities):

In 2020, Event hosting and sponsoring included:

- Wisconsin Clean Cities – We Energies provided a sponsorship to Wisconsin Clean Cities to sponsor the Electric Zone at the Greater Milwaukee Auto Show. The Electric Zone provided an area to highlight electric vehicles and educate customers on electric vehicle use, charging and how to effectively choose electric rates to charge electric vehicles at home. Information was also provided on Time-of-Use rates and how to use these rates to efficiently lower energy costs with ownership of an electric vehicle.
- US Green Building Council - We Energies provided sponsorship for USGBC Transformation Awards. Transformation is a combination of awards for newly constructed sustainable buildings and continuing education for architects, builders, engineers, etc.

Costs:

Project	Planned	Actuals
Hosting & Sponsoring Events	\$25,000	\$6,670

ATTACHMENT A

New Services¹ (Managed Accounts²)		
Service Summary by Year	2019	2020
Energy Efficiency Assistance (Consultations)	91	223
Site Assessments (Level 1)	25	11
Site Assessments (Level 2)	0	0
Technical Services	45	25
Benchmarking	3	0
Energy Team	10	11

New Services (Business Accounts³)		
Service Summary by Year	2019	2020
Energy Efficiency Assistance (Consultations)	4243	3217
Site Assessments (Level 1)	27	7
Site Assessments (Level 2)	0	2
Technical Services	6	5
Benchmarking	0	1
Energy Team	1	0

New Services (Agriculture Services⁴)		
Service Summary by Year	2019	2020
Energy Efficiency Assistance (Consultations)	14	15
Site Assessments (Level 1)	4	0
Site Assessments (Level 2)	0	0
Technical Services	0	0
Benchmarking	0	0
Energy Team	0	0

EES Unique Customers Served by Service⁵		
	2019	2020
Energy Efficiency Assistance (Consultations)	4298	3299
Site Assessments (Level 1)	51	18
Site Assessments (Level 2)	0	2
Technical Services	43	28
Benchmarking	3	1
Energy Team Assistance	11	10

1. New Service is based on the Service start date (regardless of completion date).
2. Managed Accounts includes customers that are identified as such and have an identified Account Manager.
3. Business Accounts includes all other business accounts that are not managed.
4. Agriculture Services includes farm and agribusiness customers.
5. EES Unique customers are by service. It is possible for a customer (by account number) to be listed under multiple services.